

BEFORE you meet with our office, please complete this form to the best of your abilities. This is an exercise to prepare you for our meeting.

If you decide to retain our office to prepare your Last Will, Trust, or Power of Attorneys, we will be asking you questions as to who you would appoint for these various roles. **Please be prepared to give this completed form to the attorney at start of the meeting, along with your completed Family Tree.**

I. **Executor / Personal Representative / Trustee**

This person will be responsible for distributing your assets upon your death. For married couples, usually your Spouse will be named as your 1<sup>st</sup> choice.

- 1) \_\_\_\_\_ (and his/her Relation to you)
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

II. **Financial Power of Attorney Agent**

This person will manage your assets if you are alive, but mentally incapacitated (such as ensuring your bills are timely paid). For married couples, usually your Spouse will be named as your 1<sup>st</sup> choice. Name someone honest and responsible.

- 1) \_\_\_\_\_ (and his/her Relation to you)
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

III. **Healthcare Representative (aka Health Power of Attorney)**

This is the person for talking to your doctors and making healthcare decisions for you like where you will receive care & whether you will receive certain treatments. For married couples, usually your Spouse will be named as your 1<sup>st</sup> choice. Appoint someone who is nearby. Someone who can regularly check in on you at a hospital.

- 1) \_\_\_\_\_ (and his/her Relation to you)
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

\*\*\* The people you appoint must at least be 18 or older.

\*\*\*\*You may name Co-Agents/Representatives, but they must be people who can agree on everything together. Co-Agents/Reps. are like having a car with 2 or more steering wheels. Your representatives will need to coordinate their decisions or else they will crash or go nowhere.